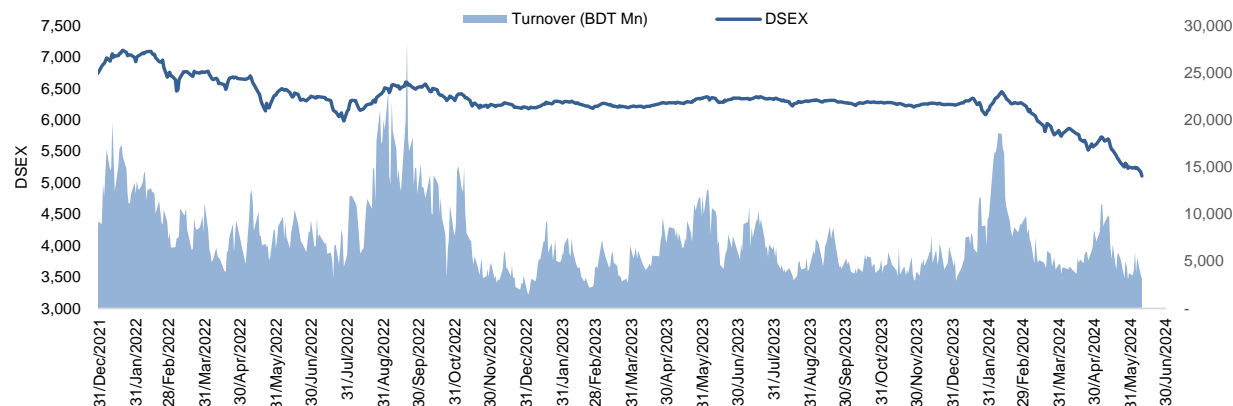


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.27%) lost 65.67 points and closed at 5,105.89. The blue-chip index DS30 (-1.29%), the Shariah-based index DSES (-1.53%), and the large-cap index CDSET (-0.91%) closed at 1,811.79, 1,103.66, and 986.50 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.57% followed by Engineering (-2.16%), Telecommunication (-1.80%), Food & Allied (-1.30%), Fuel & Power (-1.29%), Pharmaceutical (-1.22%), and Bank (-0.81%), respectively. Block trades contributed 14.8% of the overall market turnover. Orion Pharma Ltd. (+1.8%) was the most traded share with a turnover of BDT 152 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,105.89	5,171.56	-65.67	-1.27%	-18.3%
DS30	1,811.79	1,835.46	-23.67	-1.29%	-13.5%
DSES	1,103.66	1,120.83	-17.17	-1.53%	-19.1%
CDSET	986.50	995.54	-9.04	-0.91%	-18.0%

	Advanced	Declined	Unchanged	Total
All Category	26	343	22	391
A Category (Equity)	17	202	12	231
B Category (Equity)	5	94	4	103
N Category (Equity)	1	3	0	4
Z Category (Equity)	3	44	6	53
Mutual Funds	2	30	5	37
Corporate Bonds	1	2	0	3
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,338,248	6,390,986	-0.8%
	Mn USD	53,736	54,183	
Turnover	Mn BDT	3,188	3,579	-10.9%
	Mn USD	27	30	
Volume	Mn Shares	100	107	-7.2%
	No. of Trade	95,831	109,640	-12.6%

* Average Interbank Exchange Rate is BDT 117.95 as of Jun 10, 2024

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Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

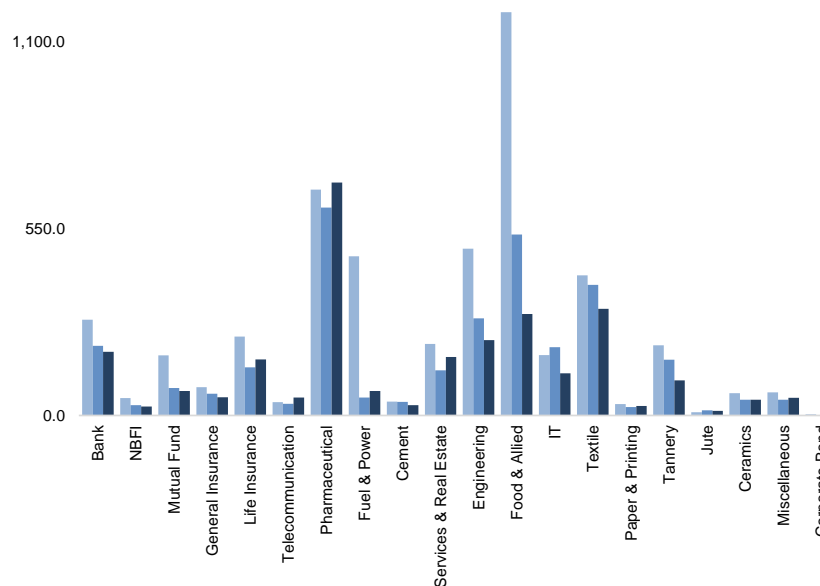
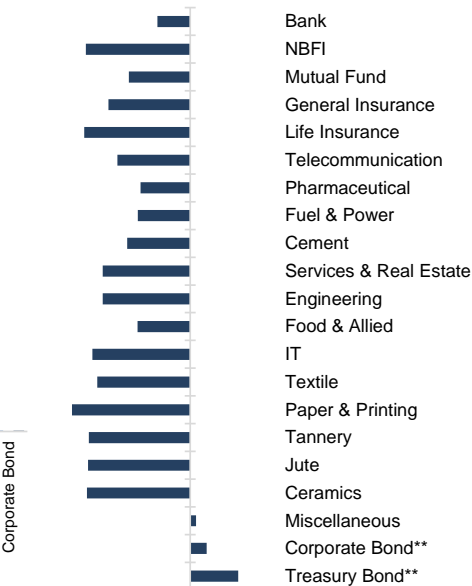


Figure: Sectorial Mcap Change

■ -4% ■ -2% ■ 0% ■ 2%



Market PE 13.1x
Market PB 1.1x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,275	1,286	-10.44	-0.81%	36	609,978	9.6%	186.9	6.9%	7.0x	0.6x	GP	304,358	9.0%	28.1	7.9x	3.8x
NBFI	1,046	1,074	-27.62	-2.57%	23	101,258	1.6%	26.2	1.0%	NM	NM	SQURPHARMA	176,581	5.2%	66.1	8.7x	1.4x
Mutual Fund	645	655	-9.95	-1.52%	37	30,151	0.5%	71.9	2.6%	NM	0.6x	BATBC	174,744	5.1%	46.0	10.0x	3.3x
General Insurance	2,792	2,850	-57.50	-2.02%	43	80,880	1.3%	53.3	2.0%	14.7x	1.2x	WALTONHIL	136,893	4.0%	5.9	10.6x	1.3x
Life Insurance	1,965	2,018	-52.79	-2.62%	15	52,247	0.8%	165.0	6.1%	NM	NM	ROBI	107,901	3.2%	21.7	28.2x	1.6x
Telecommunication	3,706	3,774	-67.76	-1.80%	3	429,112	6.8%	52.6	1.9%	9.7x	2.6x	BEXIMCO	103,842	3.1%	0.0	NM	1.2x
Pharmaceutical	2,902	2,938	-35.98	-1.22%	33	553,888	8.7%	684.8	25.2%	15.0x	1.6x	BERGERPBL	76,904	2.3%	1.8	23.6x	5.7x
Fuel & Power	1,155	1,170	-15.09	-1.29%	23	304,006	4.8%	72.2	2.7%	19.9x	0.7x	UPGDCL	71,303	2.1%	0.9	9.5x	2.1x
Cement	2,091	2,124	-33.02	-1.55%	7	99,852	1.6%	30.5	1.1%	14.5x	2.0x	RENATA	70,401	2.1%	5.7	30.7x	2.2x
Services & Real Estate	1,479	1,512	-32.64	-2.16%	9	81,791	1.3%	171.8	6.3%	25.6x	0.6x	LHBL	67,360	2.0%	20.5	11.9x	2.8x
Engineering	2,529	2,585	-55.82	-2.16%	42	292,195	4.6%	221.8	8.2%	12.2x	0.9x	BRACBANK	58,931	1.7%	55.8	6.6x	0.9x
Food & Allied	15,188	15,388	-199.60	-1.30%	21	278,854	4.4%	298.6	11.0%	14.8x	4.7x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
IT	2,391	2,450	-59.11	-2.41%	11	31,458	0.5%	123.7	4.6%	26.0x	2.0x	BXPBARMA	45,860	1.3%	10.0	8.6x	1.0x
Textile	1,189	1,217	-27.95	-2.30%	58	123,415	1.9%	313.4	11.5%	90.3x	0.8x	ICB	43,363	1.3%	1.7	NM	1.0x
Paper & Printing	6,304	6,494	-189.56	-2.92%	6	28,924	0.5%	27.9	1.0%	44.7x	1.4x	DUTCHBANGL	41,920	1.2%	1.3	5.2x	0.8x
Tannery	2,333	2,392	-59.85	-2.50%	6	25,547	0.4%	102.8	3.8%	36.8x	2.4x	UNILEVERCL	40,089	1.2%	5.0	46.4x	15.5x
Jute	14,814	15,197	-382.97	-2.52%	3	3,471	0.1%	13.4	0.5%	NM	NM	POWERGRID	35,638	1.0%	2.7	NM	0.2x
Ceramics	481	494	-12.58	-2.55%	5	21,360	0.3%	46.1	1.7%	41.7x	1.3x	EBL	34,497	1.0%	2.3	5.3x	0.8x
Miscellaneous	4,123	4,117	+5.85	+0.14%	15	224,636	3.5%	51.8	1.9%	37.9x	1.7x	BEACONPHAR	32,710	1.0%	13.4	72.6x	5.3x
Corporate Bond**	5,915	5,892	+23.73	+0.40%	16	43,434	0.7%	2.3	0.1%	NM	NM	BESTHLDNG	31,989	0.9%	57.3	23.2x	0.5x
Treasury Bond**	139	137	+1.63	+1.19%	240	2,921,347	46.1%	0.7	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SUNLIFEINS	49.6	+6.9%	23.8	NM	NM	SQURPHARMA	121,789	7.0%	8.7x	1.4x	ORIONPHARM	72.0	+1.8%	152.3	16.4x	0.8x
CAPITECGBF	11.8	+5.4%	29.1	NM	1.2x	BATBC	74,086	4.3%	10.0x	3.3x	LOVELLO	89.8	-2.1%	134.0	65.1x	6.8x
CENTRALPHL	21.9	+4.8%	127.7	NM	3.1x	BEXIMCO	69,196	4.0%	NM	1.2x	CENTRALPHL	21.9	+4.8%	127.7	NM	3.1x
TUNGHAI	4.8	+4.3%	0.8	NM	NM	RENATA	68,040	3.9%	30.7x	2.2x	ASIATICLAB	53.2	+1.7%	114.3	NM	1.1x
ATLASBANG	59.8	+4.0%	0.2	NM	0.5x	BXPBARMA	45,564	2.6%	8.6x	1.0x	FORTUNE	32.8	-3.0%	88.0	32.4x	2.3x
JHRML	68.4	+3.2%	34.0	26.8x	2.1x	GP	38,700	2.2%	7.9x	3.8x	SEAPEARL	93.3	+1.7%	78.9	31.3x	4.8x
UNILEVERCL	2,079.9	+2.6%	5.0	46.4x	16x	BEACONPHAR	34,036	2.0%	72.6x	5.3x	RUPALILIFE	173.5	-3.0%	70.9	NM	NM
RNSPIN	13.5	+2.3%	9.9	58.4x	1.3x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	SQURPHARMA	199.2	-0.9%	66.1	8.7x	1.4x
MERCANBANK	9.4	+2.2%	10.3	4.8x	0.4x	BRACBANK	30,964	1.8%	6.6x	0.9x	BESTHLDNG	30.2	-2.9%	57.3	23.2x	0.5x
VAMLRBBF	4.8	+2.1%	0.7	NM	0.5x	LHBL	28,853	1.7%	11.9x	2.8x	BRACBANK	33.3	-1.2%	55.8	6.6x	0.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
KAY&QUE	220.0	-3.0%	2.7	85.9x	2.4x	PUBALIBANK	18,457	1.1%	4.1x	0.6x	SEAPEARL	99.8	89.5	3.0	950	89.90
SONALIPAPR	281.5	-3.0%	8.3	85.6x	2x	CITYBANK	18,190	1.0%	3.6x	0.6x	AIL	131.6	119.8	10.0	536	65.53
JMISMDL	135.9	-3.0%	4.5	NM	1.6x	OLYMPIC	16,818	1.0%	14.3x	2.3x	BANKASIA	19.1	19.1	2.0	2,493	47.62
ORIONINFU	478.9	-3.0%	40.3	NM	32.1x	ROBI	15,714	0.9%	28.2x	1.6x	MPETROLEUM	201.7	198.6	2.0	188	37.54
1STPRIMFMF	35.6	-3.0%	1.0	NM	3.4x	BSRMLTD	14,210	0.8%	4.6x	0.6x	SQURPHARMA	212.0	211.0	4.0	114	24.15
USMANIAGL	35.6	-3.0%	0.5	NM	0.5x	BESTHLDNG	14,098	0.8%	23.2x	0.5x	BRACBANK	34.3	34.3	2.0	525	18.02
ANWARGALV	113.3	-3.0%	4.7	83.4x	6.8x	PRIMEBANK	13,962	0.8%	4.5x	0.6x	DGIC	27.7	24.5	4.0	622	16.22
AIL	119.8	-3.0%	51.5	48.5x	5.0x	UPGDCL	13,547	0.8%	9.5x	2.1x	DBH	29.3	29.3	3.0	500	14.65
MONNOCERA	74.5	-3.0%	3.3	21.9x	0.9x	SUMITPOWER	13,369	0.8%	28.9x	0.5x	KBPWBIL	149.0	145.0	2.0	97	14.19
ACMEPL	16.2	-3.0%	10.4	NM	0.9x						APEXFOOT	250.5	223.6	4.0	50	11.74

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond index starts at 100, starting from Jan 13, 2022
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	99.8	89.5	89.9	950	3
AIL	131.6	119.8	65.5	536	10
BANKASIA	19.1	19.1	47.6	2,493	2
MPETROLEUM	201.7	198.6	37.5	188	2
SQURPHARMA	212.0	211.0	24.2	114	4
BRACBANK	34.3	34.3	18.0	525	2
DGIC	27.7	24.5	16.2	622	4
DBH	29.3	29.3	14.7	500	3
KBPPWBIL	149.0	145.0	14.2	97	2
APEXFOOT	250.5	223.6	11.7	50	4
EIL	31.9	31.9	11.1	348	1
FINEFOODS	180.0	180.0	11.0	61	2
JAMUNAOIL	178.0	178.0	10.7	60	1
KOHINOOR	578.0	578.0	10.1	17	2
NAVANAPHAR	91.0	91.0	9.1	100	1
BEXIMCO	127.1	104.1	7.8	73	8
CENTRALINS	38.7	38.7	5.3	136	1
ASIAPACINS	37.7	36.0	4.5	125	2
RUPALILIFE	178.9	173.5	4.5	26	2
PRAGATILIF	135.0	133.0	4.5	34	3
BESTHLDNG	30.2	30.2	4.3	141	2
RELIANCE1	20.1	19.5	4.0	202	4
Total			470.2		98

Important DSE News
SAIFPOWER

The Board of Directors of Saif Powertec Limited has taken decisions to invest in Grihayan Limited, where Grihayan Limited will carry on the business as Digital Land Survey, Soil Test & Establish Modern Digital Soil Test Laboratory and all Engineering services and consultancy, all kind of civil engineering work, Digital Soil Test Laboratory & Field Test Investigators, etc. In this regard, Saif Powertec Limited will invest 65% of total equity of Grihayan Limited i.e. Taka 2,785,700.00 as investments for its subsidiary Company.

MIDLANDBNK

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Midland Bank PLC.' instead of 'Midland Bank Limited' with effect from June 10, 2024. Other things (except name) will remain unchanged.

CITYBANK

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Surveillance rating of the Company as "AA1" in the long term and 'ST-1' in the short term along with Stable outlook based on audited financial statements up to December 31, 2023 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
STANDBANKL		2.5%	3%	Record Date	11-Jun-24
RUPALIBANK		5.0%	0%	Record Date	12-Jun-24
NATLIFEINS		0.0%	38%	Record Date	12-Jun-24
PURABIGEN		0.0%	10%	Record Date	25-Jun-24
UNIONINS		0.0%	10%	Record Date	25-Jun-24
HAMI		0.0%	1%	Record Date	26-Jun-24
TAKAFULINS		0.0%	10%	Record Date	27-Jun-24
DGIC		0.0%	5%	Record Date	15-Jul-24

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